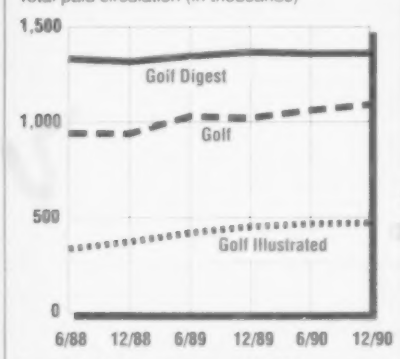
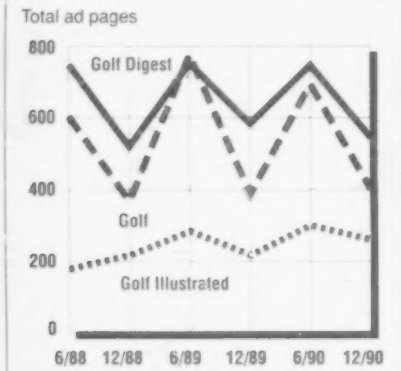
Hazards abound for golf books

Golf Illustrated has a way to go...



Source: Audit Bureau of Circulations' FAS-FAX reports

. . . but ad page share climbs



Source: Publishers Information Bureau

Advertising Age graph: John Smither

By Bill Carlino

SURVIVAL TECHNIQUES

Getting out of a recessionary sand trap will require an amazing bunker shot.

After being the only one of the three major golf magazines to record an ad-page increase last year, *Golf Illustrated* now finds itself in the gritty sands of the distressed 1991 economy.

To get onto—and into—the green, *Golf Illustrated* must win over media buyers who want reach from titles in this category and say they can get it in other golf books.

"We'll weather the storm," promises Publisher Ernest Renzulli. "It's going to be a decent year, but it's unfair to expect the same gains we've made in previous years."

Golf Illustrated, owned by Family Media, emphasizes player profiles and lifestyle features. The other two books, *Golf* and *Golf Digest*, cover all aspects of the game, including playing tips, travel, news and equipment.

According to Publishers Information Bureau, *Golf Illustrated* recorded almost 559 ad pages in 1990, an 11.8% increase over the prior year. Although *Golf* and *Golf Digest* ran about twice as many ad pages, the books reported ad page drops of 5.9% and 3.4% in 1990, respectively.

Gains in secondary ad categories drove *Golf Illustrated's* increase.

"We broke a number of new ad categories in 1990 including financial services and liquor," says Mr. Renzulli.

He attributes *Golf Illustrated's* success so far to being "a viable alternative both editorially and from a price standpoint," to *Golf* and *Golf Digest*.

"When you're going against two formidable books, the smaller kid can't go in with a parity situation regarding out-of-pocket and [costs-per-thousand]," he says.

Currently, a one-time color page in *Golf Illustrated* costs $19,345, compared with $59,160 in *Golf Digest* and $46,235 in *Golf*. In addition, *Golf Illustrated's* CPM of $38.69 undercuts *Golf Digest's* $43.82 and *Golf's* $44.03.

Although Mr. Renzulli claims *Golf Illustrated's* lower out-of-pocket cost enables economy-minded advertisers to buy space in a national publication, buyers are quick to note the differences in the books' circulations.

Golf Illustrated's circulation stands at 470,027, a 4.2% hike from one year ago. However, it lags far behind *Golf Digest's* almost 1.4 million readers and *Golf's* more than 1 million.

Ernest Renzulli

As a result, some buyers consider *Golf Illustrated* the third book in a three-title field. This perception could jeopardize the gains made in new ad categories.

"Ad pages tend not to be the best overall judge of the health of a publication," says Irving Plonskier, supervisor of print services for Young & Rubicam, New York. Y&R has placed several non-golf advertisers, such as Holiday Inn and AT&T Co.'s long-distance service, in varying degrees in the three golf books. "You also have to consider reach."

Not only are lifestyle advertisers starting to emphasize reach, but so are marketers of golf equipment, the biggest ad category in *Golf Illustrated*.

"The lifestyle slant of *Golf Illustrated* gives advertisers a unique point of difference when compared to the how-to approach of *Golf* and *Golf Digest*," says Debbie Lisa-Brown, associate media director at N W Ayer, New York, which handles sporting goods marketer Dunlop Slazenger Corp.

But because of its smaller reach, "it's still perceived as the third book in a three-book category," she says. "In this economy, there's a chance that might mean some type of slowdown on ad pages."

What's more, golf equipment companies are holding huge amounts of unsold inventory and have reined in their ad expenditures. In 1990, *Golf Illustrated's* 248 pages of golf equipment advertising was down 1.8% from the year before, according to PIB. Its 1989 tally of almost 253 pages represented a 68% increase from 1988. The other golf titles showed similar 1990 results and had gains in this category of about 16% in 1989.

But Mr. Renzulli says, "Golf fanatics are still buying clubs and other game-related products. That's the core market all three titles are after."

Another potential future problem concerns *Golf Illustrated's* ownership. Parent company Family Media has put the title up for sale, and the "black book" of financial information on the publication reportedly does not include an asking price. This allows potential owners to make an offer for *Golf Illustrated* (AA, Jan. 21). Mr. Renzulli admits *Golf Illustrated* could be sold but declined to comment further.

Despite the concerns, *Golf Illustrated* is working to increase its appeal to advertisers. The book still is banking on its existing promotion programs: the Grand Slam discount package; a five-ads-for-the-price-of-four program; and specialty columns on restaurant reviews, game psychology, exercise and nutrition. For 1991, Mr. Renzulli promises more advertiser packages.

To drive circulation, *Golf Illustrated* recently began buying time during televised tournaments on ESPN. The book also implemented a subscription package where each potential reader is mailed two free issues and allowed to subscribe.

But whether these moves will satisfy buyers who want reach from this magazine category remains to be seen.

"*Golf Illustrated* is a great book, but media buyers may feel that the money doesn't go as far," Ms. Lisa-Brown says. □

Bill Carlino is a free-lance writer based in Bronxville, N.Y.

OUT OF LEFT FIELD

Mistress of the low-brow magazine

Catherine Hughes is the tres chic *editor of* Chicago Weekly *magazine, featured in the recently resurrected ABC-TV series "Anything but Love." She runs the magazine's newsroom with a tight, if erratic, jewelry-jangling fist. She talked with* Advertising Age's *Marcy Magiera about the influences on her career and the tough times facing the magazine industry.*

Advertising Age: *How did you become interested in the magazine business?*

Ms. Hughes: It's in my genes. I always thought I should be the daughter of Donald Hollinger and Ann Marie [the main characters, played by Ted Bessell and Marlo Thomas, in ABC's 1960s series "That Girl"]. I'd have my father's passion for journalism and my mother's passion for clothes.

AA: *Do you have any role models?*

Ms. Hughes: Joseph Stalin, because he knew how to keep people in line, and Daffy Duck, because it's so important to inject humor into the workplace. Diana Vreeland, of course, and Kay Thompson, in that scene at the beginning of "Funny Face" where she sings "Think Pink." Though I hate pink . . . and Julie Newmar as Catwoman.

AA: *What magazines do you read?*

Ms. Hughes: Specialty magazines. *Soldier of Fortune* and *Highlights for Children*. But *Barbie* magazine is my absolute favorite on the face of the Earth. Because they teach you how to target a demographic, and that's what it's all about, isn't it?

AA: *Are you concerned about the demise of other hip, upscale magazines, such as* Egg *and* Wigwag?

Capital Cities ABC

Catherine Hughes (a.k.a. actress Ann Magnuson)

Ms. Hughes: [That's] less competition for me. . . . I'm just so upset the *National Enquirer* scooped us on Saddam Hussein's evil sex life. How he murders his young lovers and his passion for "Little House on the Prairie."

AA: *Do you have a strategy for* Chicago Weekly *to ride out the current recession?*

Ms. Hughes: It's important to put enough low-brow stuff in [a successful magazine]. Magazines are not for reading. You have to master the fine art of skimming to succeed in the magazine business.

AA: *Did you skip the Paris fashion shows last month because of potential terrorist activity sparked by the Persian Gulf War?*

Ms. Hughes: No. There's nothing I like better than to be one of six people on a jumbo jet. I can pretend I'm on Air Force One.

AA: *It seems that every week there's a new magazine coming out in a video format. Can you envision a video version of* Chicago Weekly?

Ms. Hughes: Oh yes, that would be great. We'd have to get the Japanese involved with that.

AA: *What would you be doing if you weren't a magazine editor?*

Ms. Hughes: I'd probably be running [apparel marketer] Norma Kamali. Or I'd be part of Madonna's think tank. □

Catherine Hughes is played by actress, singer and writer Ann Magnuson. She's currently touring Europe with her band, Bongwater.

Gone but not forgotten

After three straight annual ad-page increases, the magazine industry took a turn for the worse in 1990. Publishers Information Bureau reports ad pages of the titles it tracks fell 3.7% in 1990, compared with the year before.

The ad drought also felled a suprisingly high number of magazines. It's not just the weak sisters that have suffered, either. Some of these titles made the *Advertising Age* 300, our ranking of the leading revenue-generating publications, and several with critically acclaimed editorial or substantial circulations have fallen.

A partial list of titles that ceased publishing in 1990 and so far in 1991 follows.

Title	Year founded	Latest circulation
Business Month	1893	453,620 †
Psychology Today	1967	887,770 †
Mother Earth News	1970	703,153 †
Dossier	1975	44,204
Personal Computing	1976	487,702 †
Beauty	1979	295,513
Cook's	1979	210,111
Savvy Woman	1979	451,933 †
The Virginian	1979	29,989
Woman	1980	582,070 †
MIS Week	1980	125,200 †
New England Monthly	1984	120,112
Washington (state)	1984	63,508
Southpoint	1986	256,395
Taxi	1986	250,000 *
Memories	1987	450,000 *
Chicago Times	1987	50,000 *
Model	1988	450,000 *
Fame	1988	212,131
7 Days	1988	75,000 *
Long Island Monthly	1988	70,000 *
PhillySport	1988	40,514
Moxie	1989	350,000 *
Men's Life	1989	250,000 *
Smart	1989	250,000 *
Wigwag	1989	68,149
SportBoston	1989	50,000 *
Neon	1989	50,000 *
Business Week Assets	1990	500,000 *
Egg	1990	80,000 *

† Listed among *Advertising Age's* Top 300 Magazines *Latest guaranteed rate base

Sources: SRDS Consumer Magazine and Business Publications rates and data guides; Audit Bureau of Circulations; *Advertising Age*.

Advertising Age graph: Kimberly Mart

NOTE

ONLY THE FOLLOWING PAGES OF THIS

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NEWSPAPER

Advertising Age

March 18, 1991

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New campaign to tell HHCC's fate at Reebok

By Pat Sloan

Hill, Holliday, Connors, Cosmopulos will soon present an image campaign to client Reebok International that could determine if the Boston shop keeps what it has left of the $70 million account.

The creative presentation, expected within the next two weeks, is a make or break effort for Hill Holliday; if the agency fails, the athletic shoe account could be split between Lois/GGK and Chiat/Day/Mojo, both in New York, say sources close to Reebok.

Lois/GGK now handles part of Reebok's campaign for its Pump athletic shoe. Chiat has Reebok's international business and Weeboks toddlers' shoes.

The sources also said if Hill Holliday loses the business, Reebok could give more projects to Lois/GGK, Chiat or other shops rather than officially splitting the account.

A Reebok spokeswoman would only say Hill Holliday is the company's U.S. agency of record.

Hill Holliday CEO Jack Connors said he wasn't

(Continued on Page 55)

Can Burnett lift Lite?

Miller moves account as brand hits middle age

By Ira Teinowitz

Miller Lite, the wonder of the 1970s that created the light beer market, faces a midlife crisis longtime ad agency Backer Spielvogel Bates apparently couldn't handle.

Miller Brewing Co. last week moved the brand, which may top $75 million in media spending this year, to Leo Burnett USA, Chicago—a plum though not easy assignment.

New York-based Backer had handled Lite since the agency's founding in 1979.

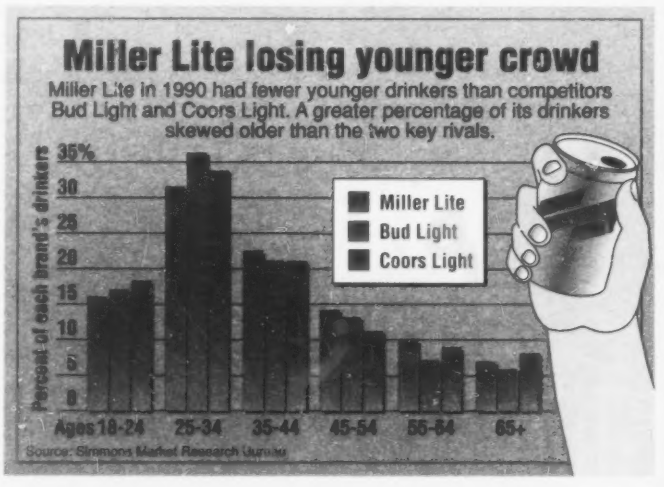
■ Rick Fizdale keeps Burnett on course—P. 54.
■ Spielvogel ready to make changes—P. 55.

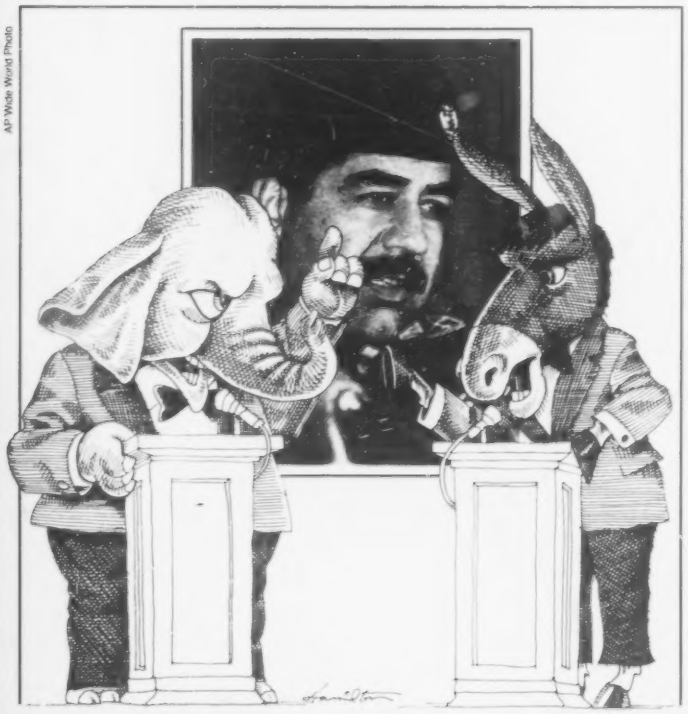
The problems for Miller Lite, still the nation's No. 2 beer, are that the average age of its drinkers has risen, and it seems to have lost much of its growth while light beers generally are booming.

Further, the brand has lost the distinctive identity it had when its reduced-calories character was the ground-breaker and a far cry from heavier beers.

To make matters worse for Burnett, reviving Lite will have to be done without risking Miller's own fast-growing brews—Miller Genuine Draft and new Genuine Draft

(Continued on Page 54)





AP Wide World Photo

Political war ads are in the works for '92

By Steven W. Colford

"Some of our finest young men and women lost their lives on that battlefield. Was their blood shed so Republicans would have something to talk about in television political commercials?"

—U.S. Sen. Albert Gore Jr. (D., Tenn.), March 6, 1991

It's about 20 months before the 1992 elections, and the answer to Sen. Gore's question appears to be yes.

Practically from the moment President Bush called off the allies in the Persian Gulf, talk of the hay that could be made from the stunning victory was rampant in political circles.

Could Saddam Hussein and the war become the Willie Horton of 1992?

Republican political consultant Mike Murphy said he's using footage of bruised and swollen U.S. prisoners of war in some generic TV commercials for focus-group testing. Mr. Murphy said he will put together three 30-second commercials with war-related footage bought from the networks and test them in a few weeks.

"My gut tells me [war ads] will play, it's just a question of how to present them."

"The environment for testing now is still too hot," he said. "Maybe we'll test them in May. We'll feel around with the focus group to find the best way to present these messages in a campaign context."

Two of Washington-based Mike Murphy Media's U.S. Senate clients, neither of whom Mr. Murphy would identify, already had expressed interest in using war ads in their 1992 campaigns.

"My gut tells me these will play, it's just a question of how to present them," he said.

Mr. Murphy's past campaigns include Republican Sen. Jesse Helms' nasty 1984 re-election victory over North Carolina Gov. Jim Hunt, a Democrat.

"It's a very legitimate issue,"

(Continued on Page 52)

LAST MINUTE NEWS

Playboy mulls launch

NEW YORK—Playboy Enterprises is exploring the launch of a U.S. edition of *Max*, a young men's lifestyle magazine, through a joint venture or licensing agreement with Italian publisher Rizzoli. Rebecca Darwin, former publisher of Conde Nast Publications' now-defunct *Woman*, is acting as a consultant and will likely serve as publisher. An oversize monthly, *Max* is published in Italy, France, Germany and Greece. "It is one of many things we are looking into," said Playboy VP-Public Relations Cindy Rakowitz.

Taco Bell tests 39¢ menu

IRVINE, Calif.—Taco Bell is testing a 39¢ Fiesta Menu with a snack-size taco, soft taco, bean burrito and tostada in Los Angeles, Dallas and Oklahoma City. The move tests Taco Bell's effort to hold its position as the value leader in fast-food. TV spots from Foote, Cone & Belding, San Francisco, support.

BMW seeks central strategy

MUNICH—BMW has asked its agencies in core markets—Germany, the U.K., Italy and the U.S.—to create harmonized campaigns for certain car

(Continued on Page 8)

INSIDE

Ad Age unveils 1990's best TV spots —Page 24

The Best Awards 1990

One-on-one: William Ziff P. 6 • **Yellow Pages Special Report** after P. 38 • **Data bases grow** P. 39

A VOICE OF THE TIMES

When the oldest continuously published monthly magazine in America turns HOT, people in the ad community want to know why.

Why is THE ATLANTIC up 42% in ad pages for 1989 and 1990? Why has THE ATLANTIC been named to Adweek's list of "10 Hottest Magazines" for the second year in a row?

You, our advertisers, made it happen. And continue to make it happen.

- You recognize THE ATLANTIC's pre-eminent editorial as the place to get across your advertising messages.
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- You know THE ATLANTIC's audience of influential movers and shakers matters in its own right and in shaping the decision-making patterns of others.
- And you understand that now, more than ever before, THE ATLANTIC is a voice of the times.

For now is a time when what you *know* matters as much as what you have. And as the majority of the population (a little older and a little wiser) looks to understand the world around them, they turn to the magazine and its readers to help them make sense of that world.

THE ATLANTIC has been described as the nation's dining-room table—a place where business people, scientists, politicians, teachers, writers, members of the clergy, the military, Republicans, and Democrats can regularly hear one another speak.

The voices are often eloquent, the subjects are wide-ranging, but most important of all is who's listening.

All of this explains why more and more of you are coming to the table with your advertising messages.

THE ATLANTIC is a voice of the times—and a great place to be heard.

The Atlantic

For information call Jayne Young, Associate Publisher (212) 326-5311

NEWS SUMMARY

■ **Miller Brewing Co.** moved its Miller Lite brand to Leo Burnett USA from Backer Spielvogel Bates. 1

■ **Republican** campaign advisers are already examining Gulf war footage for use in 1992 election races. 1

■ **Hill, Holliday,** Connors, Cosmopulos is preparing an image campaign for Reebok International that may determine whether the agency keeps its portion of the account. 1

■ **Federal Communications** Commission proposed new rules governing 900 number calls. 3

■ **Six Flags Corp.** hired McCann-Erickson to create a national brand identity for its seven amusement parks. 3

■ **Magazine ad pages** in February fell 7.5%. 3

■ **Robert Maxwell,** taking over the New York *Daily News*, said he's confident he can win back advertisers. 3

■ **Sears** broke new ads for its Discover card highlighting its unique features. 4

■ **Coors,** responding to complaints, modified its "Rocky Mountain spring waters" slogan. 4

■ **Yugoslavia** may gain new media opportunities as a result of the current political unrest. 6

■ **Media groups** expressed concern over the Four A's new position on media payment liability. 6

■ **Federal Trade Commission** said it will hold hearings on environmental marketing guidelines proposed by marketers and trade groups. 12

■ **American Tobacco Co.** is rolling out Bull Durham, a low-price cigarette, after testing in California. 16

■ **Clorox Co.** is market-testing a line of frozen entrees under the Hidden Valley name. 17

■ **Peter Diamandis** said Donnelley Marketing's massive data base is a key to his future plans for the company, which his investor group purchased. 20

■ **St. Louis Post-Dispatch** launched a $1 million campaign to attract young adult readers. 20

■ **Promotion agencies** have yet to see increased business expected from marketers reducing in-house staffs. 40

■ **Couponing** through free standing inserts was up 3.3% last year, but redemptions dropped to 2.3% from 2.9%. 41

■ **Nestle USA** will likely look for a major acquisition following its reorganization, an analyst said. 48

■ **Volvo's** first ads from new agency, Messner Vetere Berger Carey Schmetterer will be retail-oriented. 50

■ **Video Software** Dealers Association is looking for an agency to handle a campaign promoting home video. 50

■ **Sudafed** should bounce back from market share loss following cyanide tampering incidents, observers said. 53

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Shielded from recession

Can a local medium make it nationally?

By Monte Williams

When recently shopping for a clown to amuse tots at her daughter's first birthday party, Rainey Shabazz reached for the Queens Nynex Yellow Pages.

The 32-year-old homemaker, a mother of two from Jamaica, Queens, dialed four or five numbers under the "Entertainers" heading to locate the cheapest clown in town.

Ms. Shabazz didn't always research purchases so carefully.

"Three years ago, when I was planning a party for my oldest daughter, I just got out the Yellow Pages and hired the first clown in the book," she says. The sluggish economy triggered Ms. Shabazz's metamorphosis from spendthrift to bargain-hunter.

Some Yellow Pages proponents say the newfound budget awareness of consumers such as Ms. Shabazz partly explains the staying power of directories during hard times.

"During a recession, the Yellow Pages becomes a tool to save both time and money," asserts Mary MacDonald, managing director-ceo of the Yellow Pages division at D'Arcy Masius Benton & Bowles, Chicago.

"Take fluctuating gas prices. People will pull out the Yellow Pages and call different gas stations to find out what prices are on a given day instead of getting into their cars and driving 20 miles [to find the lowest-priced gasoline] in the area," she says.

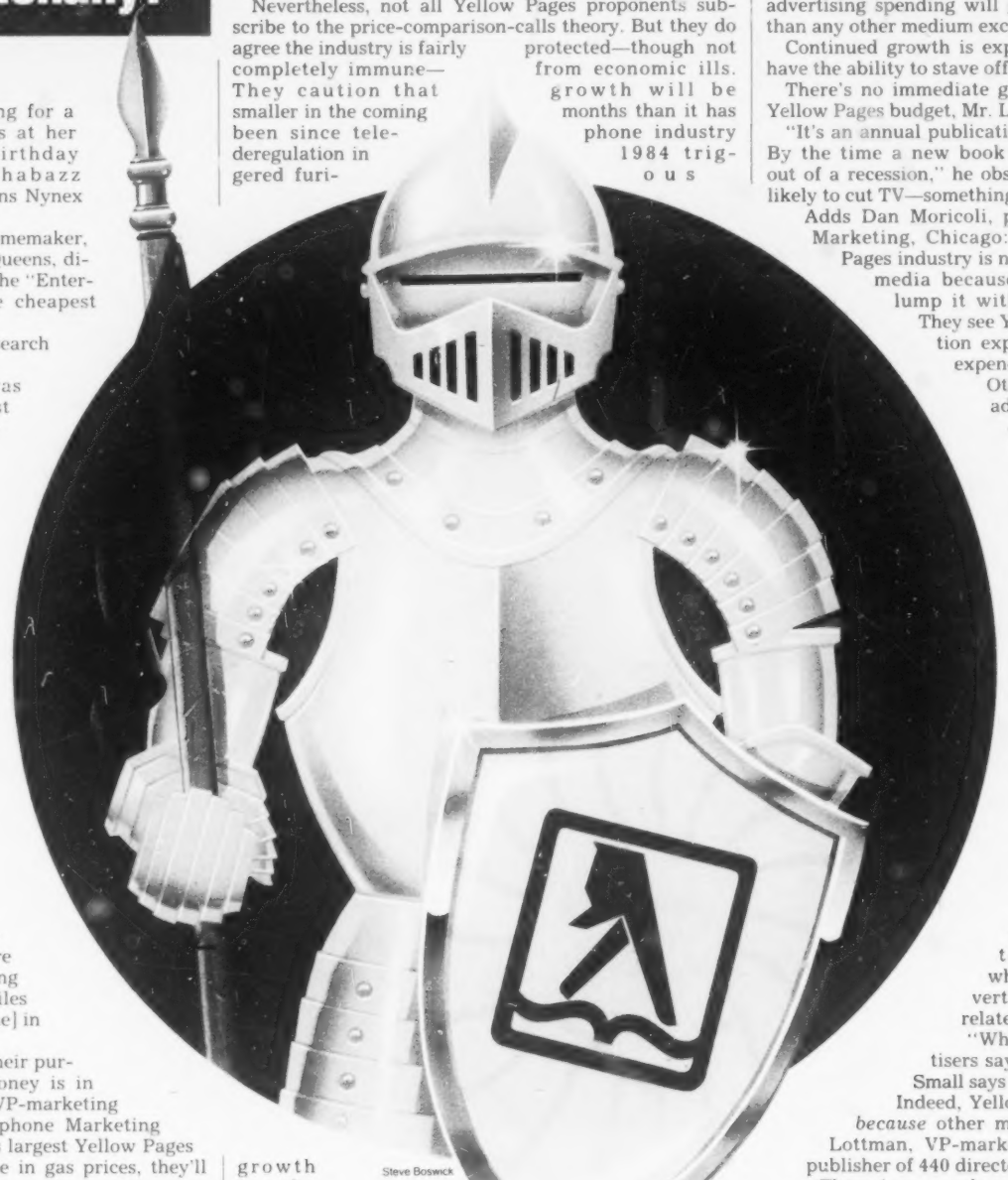
"Consumers tend to research their purchases more carefully when money is in short supply," says Bob Lamb, VP-marketing and strategic planning at Telephone Marketing Programs, one of the the nation's largest Yellow Pages agencies. "And with the increase in gas prices, they'll call first," he predicts.

In an exclusive *Advertising Age*/Gallup Organization poll, comparison shopping was given as the No. 1 reason consumers consult the Yellow Pages *(see P. S-6)*.

Forty percent of those surveyed said they use the Yellow Pages for comparison shopping. Another 32% said they use the Yellow Pages to find the closest business to their residence; 10% said they use it to find out store hours; and 6% say they use it for the local maps and street guides.

Five percent say they use Yellow Pages for any and all of the above reasons; another 6% said none of these reasons; 1% said they didn't know.

Nevertheless, not all Yellow Pages proponents subscribe to the price-comparison-calls theory. But they do agree the industry is fairly protected—though not completely immune—from economic ills. They caution that growth will be smaller in the coming months than it has been since telephone industry deregulation in 1984 triggered furious growth in the directory business.



Steve Boswick

"The Yellow Pages industry is somewhat recession-proof, but we've already been nipped here and there," Ms. MacDonald concedes.

"We've felt the economic downturn in New York City and Chicago [among the cities hardest hit by the recession], but less so in upstate New York and other areas of Illinois," adds Ken Johnson, president of Donnelley Directory. "In Las Vegas, Nev., central Florida and Cincinnati, we've had outstanding sales."

Few advertisers are likely to yank their ads from the Yellow Pages during a recession, Mr. Johnson says.

But the industry is jostled when marginal mom-and-pop operations hang up the "Going out of business" sign. And ad growth is stunted when fewer people open businesses, he observes, which is the case nowadays because of reductions in federal and private funding for start-ups. Those shopowner wannabes would have been Yellow Pages advertisers, he says.

Still, most industry insiders say the ad growth rate of Yellow Pages, which has recently exceeded other media, will continue to outpace newspapers, magazines and TV in the coming months.

Yellow Pages ad revenues leaped to $8.3 billion in 1989, a 6.4% increase from 1988, according to Yellow Pages Publishers Association. Directory revenues for 1990 should reach a projected $8.8 billion, a 6% jump over 1989, YPPA reports.

McCann-Erickson Worldwide predicts Yellow Pages advertising spending will grow by 6.6% in 1991, more than any other medium except direct mail.

Continued growth is expected because Yellow Pages have the ability to stave off the recessionary pinch.

There's no immediate gratification in cutting one's Yellow Pages budget, Mr. Lamb says.

"It's an annual publication with months of lead time. By the time a new book is published, we're in and out of a recession," he observes. "Advertisers are more likely to cut TV—something they can feel right away."

Adds Dan Moricoli, president of Grey Directory Marketing, Chicago: "Traditionally the Yellow Pages industry is not impacted as much as other media because advertisers don't tend to lump it with their advertising budget. They see Yellow Pages as a communication expenditure, not an advertising expenditure."

Others note the industry's core advertisers are service providers—plumbers, florists, beauty parlors, for instance—not retailers, such as large department stores, which have been hardest hit by the economic slowdown.

"Eighty-eight percent of Yellow Pages advertising revenue is locally generated," says Larry Small, YPPA's VP-marketing. "For some mom-and-pop businesses, the Yellow Pages is their only source of advertising. They aren't likely to pull out."

Though publishers' core advertisers are safe, some predict the recession will quash the industry's high hopes of attracting more national brand advertising through BrandSell, which offers package-goods advertisers product exclusivity in related categories.

"When times are tough, advertisers say 'No way' to new ideas," Mr. Small says *(see related story on P. S-2)*.

Indeed, Yellow Pages will do well in part *because* other media do poorly, claims Don Lottman, VP-marketing of Southwestern Bell, publisher of 440 directories.

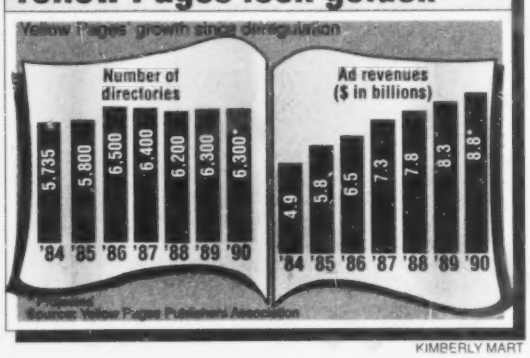
"There is so much media fragmentation, with direct mail, new magazines, cable TV," he says.

Moreover, directories deliver a different type of customer, Mr. Lamb notes.

"We're a directional medium, not a creative medium," he observes. "People who pick up the Yellow Pages already want to buy something. The Yellow Pages helps them decide who to spend their money with." □

Monte Williams is a free-lance writer based in New York.

Yellow Pages look golden



KIMBERLY MART

INSIDE

REVIEWING STAND

Who uses Yellow Pages?

Advertisers have raised a lot of questions concerning Yellow Pages research and consumers' use of them. The lack of such information has often been cited as a reason more non-traditional Yellow Pages advertisers don't consider the medium in their buys.

AD AGE GALLUP SURVEY

To help research-seeking advertisers, *Advertising Age* commissioned Gallup Organization to ask consumers how many times a week they used the Yellow Pages. Their responses follow, reflected in averages and ranked in descending order.

Other highlights of our exclusive survey–detailing how specific consumer groups use the Yellow Pages and which types of Yellow Pages advertising they find most effective–appear on Page S-14.

Average number of times each week consumers use the Yellow Pages

Total weekly usage 2.96

By income

$50,000 and over	3.86
$30,000 to $49,999	3.27
$20,000 to $29,000	2.44
Less than $20,000	2.60

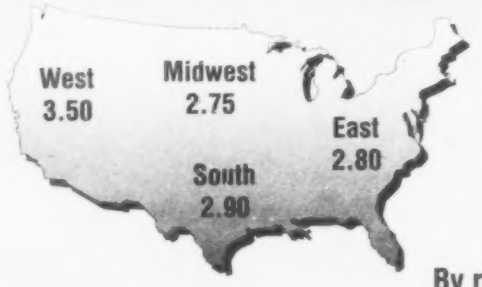
By age

1991	
18-34	3.52
35-54	3.29
55+	1.47

By marital status

Single	3.56
Married	2.78
Widowed	0.97

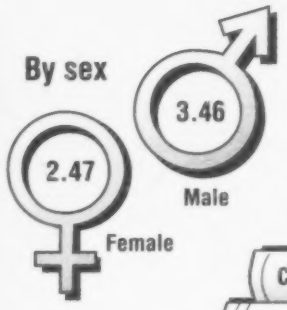
By geographic location



By race

White	3.10
Hispanic	2.35
Black	1.95
Other	1.92

By sex



By education

College grad	3.75
H.S. grad	3.00
Some college	2.66

By occupation

Self-employed	5.08
Sales	4.36
Clerical	3.31
Service	3.29
Trade	3.17
Professional/management	2.79
Labor	2.45

John Doe
Week ending 3/15/91

Note: Results are based on telephone surveys of 1,012 consumers in January. The margin of error is plus or minus 3.1.

Source: *Advertising Age*/Gallup Organization **Advertising Age graph:** Cynthia Watson

Lack of research bursts national ad dream

Failure to implement intramedia studies holding back Yellow Pages publishers

By Patricia Strnad

The siren song of national advertising has smitten Yellow Pages publishers.

But national advertisers and their authorized selling representative (ASR) agencies have a problem listening to Yellow Pages publishers, citing the lack of third-party usage research as the medium's biggest sour note.

Such data, known as intramedia research, compare competing books and rate individual Yellow Pages directories on consumer usage.

But the need to boost national advertising is becoming acute for Yellow Pages. Local advertising, which accounted for 88% of Yellow Pages' 1989 revenue of $8.3 billion, is expected to flatten, forcing publishers to look elsewhere for revenues.

While five of the nine largest publishers subscribe to measurement services for some of their books, advertisers and Yellow Pages agencies are pushing for intramedia research industrywide —or at least in all major markets with competing directories.

The idea isn't new. Two years ago, a Yellow Pages Publishers Association task force acknowledged the merits of book-to-book comparisons but decided not to endorse such research industrywide, angering Yellow Pages advertisers.

"They're looking at it only from a publisher's perspective of how to make more money," says Marcia Greene, manager of telephone directory advertising at Roto-Rooter Services Co.

"If they want to be a credible ad medium, they need to look at providing the best product for their advertisers."

Without research, Ms. Greene says she has trouble knowing where to place ads.

"We have to spend our money wisely," she says. "The idea that advertisers have deep pockets can't continue forever."

One reason YPPA continues to give for not endorsing industrywide, intramedia research is that the number of competing markets is declining.

ASR agencies say that's true but not exactly a fair assessment. Before the breakup of AT&T Co. in 1984, publishers had monopolies in their markets. After divestiture, Bell companies and independents invaded one another's territories, resulting in explosive growth of directories.

Many directories have since failed and the industry has stabilized, but several major markets remain hotly competitive, agency executives say.

Also fueling YPPA's decision were concerns that such research would merely reallocate existing ad dollars rather than bring in additional revenue, says Larry Small, VP-marketing.

Instead, YPPA decided to move forward on syndicated intermedia research that compares and highlights the benefits of advertising in Yellow Pages vs. other media.

"The problem with that is other media start by measuring their own [usage] first," says Bettina Eichel, consumer research manager at Pacific Bell, which has subscribed to audience-measurement services for four years. "You really need a good measure of how much you're used before you can start comparing yourself to other media."

Mr. Small says many publishers still believe intramedia research won't bring in more ad revenue, but "the realities are, without that type of syndicated research, there's the possibility of market erosion. So now it's more of a defensive than an offensive tool."

The industry "is going to have to become more sophisticated in terms of data" to grow, he says.

As things stand, some advertisers won't even consider the Yellow Pages, says Blanche McGuire, senior VP-marketing resources at Ketchum Directory Advertising, Pittsburgh.

"Our clients need to be able to calculate the return on investment to justify their buys," she says. "The watchword in today's economy is 'prove it.' "

Publishers not subscribing to syndicated intramedia research argue that it's much more expensive than doing their own research.

"I'd rather explore the opportunities in intermedia research," says Kurt Roessner, director-data-base marketing at Nynex Information Resources. "I'm doing my own, less-expensive version of intramedia research, so I already know what the market's doing."

GTE Directories Corp. doesn't subscribe to syndicated intramedia research because "we don't consider what's out there now to be true syndicated research," says Cindy Johnson, marketing director.

"We consider it sponsored third-party research, which is the same thing GTE does. To us, true syndicated research is similar to what Simmons does, where the research is done no matter who buys it."

Most ASR agencies and advertisers are wary of publishers' proprietary research, arguing none has ever presented itself as second-best.

"They've put out so many proprietary studies that I don't even open them," says Leonard Pollack, director of research for Wahlstrom & Co., Stamford, Conn., Foote, Cone & Belding's Yellow Pages subsidiary. "It's just another self-promotion piece, and it won't get past my desk."

Many industry observers believe syndicated, intramedia research runs counter to the pre-divestiture Yellow Pages culture of secrecy.

"It's kind of scary to a lot of publishers to think of an outside company coming in and measuring your markets and that you can't control how they do it or what they report," Pacific Bell's Ms. Eichel says.

> **"The watchword in today's economy is 'prove it.' "**

But intramedia research usually confirms what a publisher already knows, says Mary Ann Packo, president of National Yellow Pages Monitor, which measures 30 major markets for more than 400 directories by Pacific Bell and BellSouth Corp.

Although Yellow Pages have a long way to go before sufficiently meeting advertiser and agency needs, most are encouraged by the growing number of publishers exploring intramedia research.

"There are more and more media choices out there," says Advertising Research Corp. Exec VP Sherrie Starr, "and if Yellow Pages wants to be up there in the top media choices, they're going to have to take that step forward." □